

Internal Users' Guide to Switch Applicant Agencies in Egrants

Introduction: There was a recent change to Egrants which removed the ability of an external user to change the applicant agency on a grant. This change was necessary for security purposes and to ensure that all external users who must access a grant would be able to do so after the applicant agency on that grant is switched. The following steps detail how an internal user proceeds when it is necessary to change the applicant agency on a grant.

1. Verify in CONTACTS that the new agency is registered in Egrants and that the “Eligible to Apply for Grants” box is checked.
 - a) If the new agency is not found in CONTACTS, have the new agency complete the [Agency Registration Request Form](#). Once the completed form is returned to you, the new agency can be created in CONTACTS.
 - b) If the new agency is found in CONTACTS, but the “Eligible to Apply for Grants” box is not checked, have the new agency complete the [Agency Registration Request Form](#). Then add all required information to the agency’s profile in CONTACTS and select the “Eligible to Apply for Grants” box. Fiscal staff will have the ability to check this box.
 - c) If the new agency is found in CONTACTS and the “Eligible to Apply for Grants” box is checked, proceed to step two.
2. Verify that all users who must be able to access the grant are registered in Egrants and have the proper roles for the new agency.
 - a) Any individual not registered in Egrants who must access the grant after it is switched to the new agency must register in Egrants. Direct them to the Egrants [On-line Registration Quick Start Guide](#).
 - b) Any individual who is registered in Egrants but does not have the appropriate access to the new agency must submit an access request to the new agency’s User Manager (if the new agency has a User Manager). If the new agency does not have a User Manager, the individual(s) must submit a [User Registration Request Form](#) to the ICJI Egrants Help Desk to request access to the new agency. All access requests must be approved either by the new agency’s User Manager or the ICJI Egrants Help Desk prior to switching the applicant agency. Check with fiscal or IT staff to confirm that all users have appropriate access to the new agency.
 - c) You may proceed to step three once all individuals who must access the grant once it is switched to the new agency are registered and have the appropriate roles with the new agency.

Coordinate the following two steps with Grants Management staff.

3. Switch the Applicant Agency in Egrants.
 - a) If the grant is awarded, you must create an internal Project Modification Request. The applicant agency does not have to sign this project modification request. It is for internal use only to record the applicant change. Click the Change Applicant button on the Modification Main Summary page. Search for and select the new agency. Depending on

- the circumstances, a fully executed Novation Agreement may be necessary prior to creating the modification request.
- b) If the grant is not awarded, you may change the applicant agency by clicking the Change Applicant button on the Application Main Summary page. Search for and select the new agency.
4. In the majority of cases, you will have to change the Recipient Agency too. Changing the Recipient Agency may impact the budget setup options. If there is only one recipient agency or the recipient agency you attempt to delete is not a Master Budget, you will lose the entire budget for that agency.
- a) Click the Add Recipient button. Search for and select the new Recipient Agency.
 - b) Set both the old and the new Recipient Agency budgets to Master Budget.
 - c) Delete the old Recipient Agency.
 - d) Set the new Recipient Agency budget to the appropriate budget type.
- *Steps B, C and D above will transfer the old Recipient Agency's budget to the new Recipient Agency.*